

# White Paper Report

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# MOTION PICTURE ORAL HISTORY DIGITAL ARCHIVE

## PLANNING PHASE: WHITE PAPER

### OVERVIEW

Spearheaded by the preservation mission of the Academy Foundation and its investigations into at-risk oral history collections of peer film organizations, the Academy Foundation and seven partner institutions are working to create a vast and accessible digital archive of oral and visual histories—the **Motion Picture Oral History Digital Archive** (Archive).

The Archive will document the lives and careers of generations of individuals who have contributed to the history of motion pictures and the cultural, social, political, and technical innovations of the field. The project brings together the oral and visual history collections of a founding partnership of the Academy Foundation, Art Directors Guild, Film Music Foundation, International Cinematographers Guild, Motion Picture Editors Guild, Screen Actors Guild Foundation, Screen Actors Guild-American Federation of Television and Radio Artists, and Writers Guild Foundation.

The project will ensure the long-term preservation of audio- and video-recorded oral history materials on the history of motion pictures and will make these materials accessible through a Web-based portal. When launched, the Archive will be the most complete and unified collection of indexed and searchable interviews with practicing filmmakers in the world. The Archive is anticipated to include approximately 1,000 oral and visual history interviews, totaling an estimated 4,000 hours of material with additional interviews added as new productions are completed.

Central to the success of the project is the creation of a method for indexing and annotating oral history interviews with segment-level descriptive metadata corresponding to timecode. Linking search terms to corresponding moments in the interview results in an indexed interview which is browsable and searchable. This enables users and researchers to explore, navigate and engage with the Archive in a precise and strategic way.

The goal of the project's planning phase was to create a strategic plan that would bring organizational coherency to the Archive project, further humanities scholarship within the Archive and related collections, and position the project to immediately begin its implementation phase. The planning phase was guided by an Advisory Panel which included Miranda Banks, Emerson University; Doug Boyd, University of Kentucky Libraries; Sam Gustman, USC Shoah Foundation; and Rick Jewell, University of Southern California School of Cinematic Arts. Joanne Lammers, Writers Guild Foundation, and Steven Poster and Christian Pitt, International Cinematographers Guild, served as advisors representing partner organizations.

## Background

For many years, Los Angeles-based guilds and film organizations have been recording oral histories with filmmakers, pointing to an opportunity to create a shared space around the documentation of artistic practice, craft, and technology—one that mirrors the collaborative nature of filmmaking. The Academy’s first oral history interview was made on a wire recorder in 1948, and its ongoing oral history program has evolved over the years. Other like-minded organizations existed with a common goal, which was to document and disseminate oral histories that served to illuminate the people, traditions and skills of the many crafts and arts that constitute the motion picture industry. Once recorded, however, many of these interviews remained inaccessible and without plans or support for their long-term preservation.

The formation of the Academy Oral History Projects department in 2012 was an attempt to bring a more cohesive approach to these important contributions to film history. The Archive project emerged from a need for improved long-term preservation and public access to collections, and the desire to unite similar interview collections about filmmaking crafts. Seeking partnership in this initiative, efforts were made by the Academy to reach out to a number of Los Angeles-based guilds and film organizations with member interviews, including founding partners the Art Directors Guild, Film Music Foundation, International Cinematographers Guild, Motion Picture Editors Guild, Screen Actors Guild Foundation, SAG-AFTRA, and Writers Guild Foundation.

## Project Activities

The planning phase supported collection research, a series of advisor and partner meetings, and the creation of a strategic plan to develop and launch the **Motion Picture Oral History Digital Archive**. The outcomes of the planning phase were to establish partnership protocols, rules and mechanisms; preliminary development of an indexing controlled vocabulary; documentation of standards and best practices; recommendations for an archival platform; and the creation of a prototype archive mock-up.

*Project scope:* The planning process began in May 2014, when AVPreserve was hired as the project’s planning consultant, with consultants Seth Anderson and Bertram Lyons assigned to the project. As its first activity, AVPreserve conducted multiple research interviews with partner archivists, librarians and staff, as well as Advisory Panel members. These interviews helped establish an understanding of each stakeholder’s vision and goals of the project, their role, concerns, and desired outcomes for access. This outreach built on a previous Academy Oral History Projects department survey of all potential Archive content, which included formal oral history interviews to panel discussions, conducted from 1948 to the present. Taken together, the AVPreserve partner interviews and the Academy collection survey provided a strong foundation for the first partner and Advisory Panel meetings and the development of the strategic plan.

In regard to the collections specifically, one outcome of the first Advisory Panel meeting was the decision to not bind the collecting scope to narrow or “traditional” definitions of oral history, and to

include other types of interview-oriented materials, as well as ancillary materials related to interviewees and production. During collection processing, the project's archivist viewed content in order to clearly identify and describe the interviews in scope. From the multiple interview types evaluated, interviews were considered for collection inclusion by the following criterion:

- Topics and themes discussed (e.g., did the interview focus on work, life, and career of the interviewee?)
- Structure of the interview (e.g., was the purpose of the interview to document the interviewee's full career story?)
- Format of the interview (e.g., was the interview long form?).

Most interview content was accepted, including long-form career-interviews conducted in front of an audience. However, interviews conducted in preparation for a panel or public event were determined to be considered supplemental materials to the greater collection.

**Project Evolution:** In the early stages of the project, the Archive was envisioned as a shared archive that would be hosted by the Academy but governed collectively by a "consortium" of all partners. One of the primary outcomes of the planning grant's first Advisory Panel meeting held in July 2014, was the decision to separate the project into two distinct initiatives: the Motion Picture Oral History Digital Archive (Archive) and The Coalition for the Documentation of Moving Image Crafts. During a subsequent Coalition meeting, partners agreed that this separation would clarify the purpose and management of the Archive from other initiatives of the Coalition, particularly around interview production. It was determined that the Archive would be an Academy-led and managed project, thereby centralizing infrastructure and governance and allowing the project to build on existing and developing workflows and technology to grow and maintain the Archive's collections.

Following this, the Coalition was established as a community of practice united around a common vision: the documentation, preservation, and dissemination of the history, professions, people, and skills of the many crafts and arts that constitute the industries associated with moving image creation, including but not limited to the motion picture and television industries, and related crafts and technologies.<sup>1</sup> Although the two projects inform each other and are made up of many of the same participants, moving forward, the planning process addressed the Coalition and the Archive as distinct projects.

**Coalition development:** On June 9, 2015, the Coalition met to approve a final draft of the charter, which defines the mission, governance, activities, and framework of launching the group and recruiting new members. Included in the charter was a new name for the group - the Coalition for Moving Image Craft Documentation (Coalition). This allows the group's organizational membership to expand beyond the motion picture industry to include television and other media. The name change reflected the broad evolution impacting the entertainment industry, as most professionals now

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<sup>1</sup> Coalition By Laws and Charter

work across media, including film, television, video, and online. The draft charter was approved by the Coalition in July 2015. The charter outlines the Coalition's:

- Mission and vision
- Purpose
- Membership guidelines
- Governance
- Annual, regular and committee meetings
- Procedural policies in regard to decision making and communication
- Committee structure.

During planning, partners expressed a need for guidance on recording new oral histories and improving existing interview production practices. To address this, in November 2014, the Academy organized a workshop on Oral History best practices, led by Teresa Barnett, UCLA Center for Oral History Research, Charles E. Young Research Library; Mae Woods, the Academy's long-time oral historian; Teague Schneider; and Genevieve Maxwell. Planned activities of the Coalition include a video editing workshop as well as establishing a shared database to track interviews. The Coalition will improve production practices by sharing resources among its members, developing standard research guidelines, and avoiding any duplication of interviews, combining to improve the overall quality of new Archive content.

**Strategic plan development:** The planning phase also supported the creation of a strategic plan that would bring organizational coherency to the project, resolve the challenges of combining distinct collections through the creation of a unified archive, and to further humanities scholarship within the Archive and its related collections. The plan was created by the Academy Oral History Projects department and AVPreserve, with key input from the Advisory Panel. It serves as the starting point for the Archive's implementation phase and the basis for the Academy Foundation's upcoming implementation grant request. The plan outlines five goals and ten objectives that will guide the design, development and implementation of the Archive project:

1. Manage long-term and trustworthy preservation
  - Develop a comprehensive preservation plan for current and future oral history interviews
2. Generate accurate and efficient description of content
  - Establish a controlled vocabulary for indexing of interview content
  - Develop and implement a system for indexing of current materials
  - Complete initial indexing of interviews and develop workflow for ongoing indexing
3. Offer flexible and agile access to collection content
  - Develop a user access plan
  - Implement an online access platform for digitized content
  - Implement rights management and licensing procedures for use of collection content
4. Ensure the continued inclusion of unique and salient oral and visual histories
  - Increase strategic acquisition of oral history interviews
  - Continue visual history productions and co-productions for inclusion in the Archive

5. Encourage scholarly engagement through targeted outreach efforts
  - Support and promote the scholarly use of digital oral history content and related resources by researchers, students, educators, and the general public.

*Preliminary controlled vocabulary:* The strategic planning process included research and development of the preliminary thesaurus of indexing terms, which was two-fold. The first phase focused on outreach to Archive partners to gather terms specific to their profession or craft. These terms were gathered by pulling from existing glossaries, viewing content, and brainstorming. The Academy Oral History Projects department met with each partner to elucidate what subject terms could be used to describe topics covered in the interviews. Once these were gathered, the second phase of the development focused on structuring, defining, and establishing relationships between terms. The priorities for completion of this phase were:

- Reconciliation of alternative forms for conflicting terms
- Categorization of (most if not all) terms into broad categories, e.g. specific professions or crafts, general subject related terms, time periods, technical terms related to processes, genres, etc.
- Define variants for synonyms that are not the preferred term
- Provide full information for a subset of terms (i.e. definitions with citations, variants, relationships) to be expanded upon at a later stage.

*Indexing:* Research into archival access also was part of the strategic planning process, as granularity in indexing of interview footage—allowing users to search with keywords and discover individual segments—was an expected feature of the Archive. There was some discussion during the Advisory Panel meetings on the expected level of indexing, what would be cost-effective, and what would most benefit archive users. The broad user groups the Archive hopes to serve, from academic researchers to the general public, complicates this debate, as expectations of granularity could vary greatly between these groups. To accommodate this wide audience and to use the full potential of the Archive’s proposed indexing system; an Archive-specific controlled vocabulary is currently in development and will be integrated into the overall Academy taxonomy. The Academy’s taxonomy employs a combination of established authorities, such as the Getty Art and Architecture Thesaurus and Library of Congress Subject Headings. The Academy will use the Margaret Herrick Library’s Film Title Master List as the authority file for film titles, filmmaker names, and other production specific information.

It also was determined that rather than hire, train, and manage a team of part-time indexers specifically for the Archive project, the best solution would be to partner with an institution that specializes in time-based indexing of video oral histories. In addition, the Academy will ensure the Archive’s preliminary indexing thesaurus is ANSI/NISO Z39.19 standard compliant. Ongoing development of the taxonomy will be supported by Academy infrastructure and workflows for metadata governance.

**Processing workflow:** To centralize storage, it was formally established that all partners would deposit their collections at the Academy, governed by the agreements of the Academy Film Archive. To accommodate processing of the collection's 1,100 interviews, a workflow was established by the Academy Oral History Projects department and Film Archive which included:

- Evaluation of content upon arrival to the Academy using existing inventories and/or creating new inventory lists
- Assessment of material based on collection scope, i.e., identifying unedited and edited masters
- Creation of catalog records in the Academy's collection management system
- Viewing of content to assess recording quality and generate descriptive metadata.

Materials were inspected (when possible, including playback) and content that not fit within the collection policy was returned to depositors or deaccessioned. Born-digital materials were inspected and prepared for ingest at the Academy's digital repository at USC. Information gathered during processing will be used for prioritization of interview content, as well as in the development of summaries, biographical, and collection descriptions.

**Production guidelines:** The Academy has developed guidelines for oral history interview production and post-production that outline workflows, technology, settings, formats, delivery methods, and hardware as well as best practices and guidelines for researchers and interviewers. The goal of these standards is to ensure high quality productions that follow oral history best practices. These guidelines have been shared with the partners to help support the development of their recording initiatives. This was a key step in opening up dialogue about strategies to address resource allocation, advocating for recording initiatives, dealing with limited staff and other obstacles.

## AUDIENCE

The Archive's development begins a long overdue process to preserve these interviews, in many cases the only record of the craft point-of-view on a particular film production or film subject. The searchable web-based archival framework will make these once-hidden interviews freely accessible to a core audience of film scholars, researchers studying film history and labor history, and filmmaking practitioners; curators; journalists; and universities, film schools, and libraries. Most significantly, archival access will increase the reach of these interviews, connecting with a far wider audience of the general public with an interest in film. Young people will be inspired by the stories of professional filmmakers regarding the beginning of their careers, and the challenges they have faced. And students, teachers, and film enthusiasts will have access to the resources of some of the country's most prominent film organizations.

## ACCOMPLISHMENTS

During the planning phase the following has been accomplished:

- Development and approval of a strategic plan to guide the Archive's design, development, and launch
- Development and approval of Coalition charter to establish founding membership and governance structure
- Six of eight partner collections are processed with primary source material deposited at the Academy Film Archive and digital preservation copies stored at USCDR, which include:

Academy Oral History collections  
Art Directors Guild collection  
Film Music Foundation collection  
International Cinematographers Guild collection  
Motion Picture Editors Guild collection  
Writers Guild Foundation collection

- Collection descriptions have been written for all current collections and posted on the Academy Film Archive and Oral History Projects subpages of the Academy's programmatic website ([oscars.org](http://oscars.org))
- As of July 2015, nearly 2,500 media carriers have been digitized, representing more than 500 oral histories digitized and stored
- Production guidelines for research, interviewing, recording, post-production were created and shared
- An oral history workshop on interview best practices was conducted.

## CONTINUATION OF PROJECT

The Archive project will continue from its planning phase into its implementation phase and public launch. The Academy Foundation plans to submit an NEH Humanities Collections and Reference Resources implementation grant to help develop the Archive's infrastructure, which will be hosted within the Academy's digital management infrastructure platform, as well as design the public web portal where users will access collection content. New interviews, recorded either by or in co-production with partners, will be indexed then uploaded to the Archive as they become available.

As a result of the success of the planning phase, the Academy of Television Arts & Sciences and BAFTA Los Angeles (British Academy of Film and Television) have joined the Coalition. Several additional organizations are working actively with their boards to participate in Coalition activities

and possibly include their collections in the Archive. As the Archive will remain focused on motion picture history, however, the Television Academy Foundation will participate as a coalition member only.

With these additional collections and future interviews, it is anticipated that at the project's launch, the Archive project will:

- Create eight collection level finding aids and/or collection descriptions
- Catalog a total of:
  - 3,223 carriers
  - 1,100 interviews
- Digitize a total of 1,318 audiocassettes and 1,905 videocassettes
- Preserve and make available a total of 1,875 hours of sound recordings, and 3,838 hours of moving images.

## EVALUATION

To ensure the planning process continued to meet the needs of all participants, the project team sought feedback and input from partners, Academy staff, and Advisory Board members. Project milestones and findings were shared with the partners on an ongoing basis and information was analyzed and used to inform project activities and strategies.

The interviews conducted by AVPreserve helped to gather important early feedback from partners. This included the need to better position the role of the Academy with relation to the Coalition, the need to leverage existing expertise and procedures within the Academy to support the Archive's goals and the importance of accessibility as a shared goal. This feedback was evaluated and helped provide an initial foundation from which the development of the Coalition and the strategic plan were approached, specifically the decision to separate the Coalition and the Archive projects.

How the Archive will address rights issues also was evaluated, particularly as more awareness around the status of release forms for all interviews became known. As the Academy Oral History Projects department worked with partners to prepare interviews for access, they evaluated both rights and permissions and needs for editing. During this process, one partner discovered that a portion of their interviews did not have the proper release forms and that in order to make them accessible online, interviewees are being re-contacted to sign the correct forms. In addition, the Oral History Projects department determined that each partner would be best equipped to decide how their collection interviews should be edited. Therefore the partners have taken on responsibility for both clearing rights and video editing of their content.

## LONG TERM IMPACT

The long-term impact of the project will be the creation of a collaborative means of sustaining the oral and visual history interviews of generations of creative and craft professionals in American filmmaking. This includes establishing best practices for the research and production of visual history interviews, shared best practices, and a workflow for co-productions among industry foundations and guilds.

The Archive will foster collection sustainability through centralized storage and cataloging, the use of established metadata standards, and digital preservation. Unifying the collections into a single digital resource will enable content to be used for education, public programming, and as a resource for scholars and researchers, journalists and media. The collection will provide opportunities for audiences to access first-hand accounts from film professionals, creating an important link between the academic study of film history and media education with the men and women who make motion pictures.

The planning phase of the project helped to increase the visibility of the preservation and scholarship goals of the Coalition partners. While all Coalition partners focus on the entertainment industry, each organization is devoted to the preservation of its history and the accessibility of the life work of its membership, a testament to their impact on American film history, and the greater narrative of national arts and culture.

The creation and launch of the Archive will help to further these preservation and access goals for the benefit of the general public.

## GRANT PRODUCTS

The grant products for the planning phase include this white paper, Coalition charter, strategic plan for the design and construction of the Oral History Archive, and two sample design mock-ups of an interview detail page and a sample results page.

Archive strategic plan:

[http://www.oscars.org/sites/default/files/af\\_strategic-plan.pdf](http://www.oscars.org/sites/default/files/af_strategic-plan.pdf)

Coalition charter:

<http://www.oscars.org/sites/default/files/af-coalition-charter.pdf>

Prototype design - interview detail page:

[http://www.oscars.org/sites/default/files/af\\_interview-details-page.jpg](http://www.oscars.org/sites/default/files/af_interview-details-page.jpg)

Prototype design - search results page:

[http://www.oscars.org/sites/default/files/af\\_search\\_results\\_page.jpeg](http://www.oscars.org/sites/default/files/af_search_results_page.jpeg)